

May 01, 2001 Release

FC SDM Template Instructions

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General Instructions

1. To open a template for any new document, click on File, New and the template number.
2. Save all documents prior to entering information. On opening a new template, you will be immediately prompted to name and save the document prior to any data entry. The document must be saved. Follow local procedures to name the document.
3. The case information dialogue box will pop up. Complete all required fields and press enter.
4. Hidden Text will be the default view for all templates (effective date 5/1/01) and may not be turned off by clicking on the ¶ icon on the Standard Toolbar. Hidden text will not print unless instructed to in the Print, Options dialogue box.
5. Hidden text may be printed by clicking on File, Print, Options and clicking in the Hidden text box so a checkmark appears. If you turn hidden text on to print, you must then turn it off after printing or it will print every time.
6. Procedures have changed for adding rows and sections for the templates have been altered and are standard in all templates. As a result, the toolbars for the ISP, USP, PWSP and Parent Agency Service Agreement have changed. Instead of using the toolbars to add a row or section, simply click into the first field in a row or section and a dialogue box will appear that prompts for the total number of additional rows or sections. For purposes of this document, the fields where an add is possible are marked with an 'X'.
7. If at any time, a dialogue box appears and you do not want to add the row or section, simply click 'Cancel' in the dialogue box or press 'Escape' on the keyboard.
8. If you add a section or row by mistake, immediately close the document without saving. The reopen the document and it will be the same as before you added the section or rows. Do this by clicking on File, Close; when prompted to save the file, click no. Reopen the document by clicking on File, Open and then the name of the document.

Adding Additional Children:

Identifying Information Section:

- a. To add one or more children to a new ISP, USP and/or PWSP, click into the “Name” field for the child; a dialogue box will pop up. You will be prompted for the total number of additional children for the report. Enter the number; click OK and the additional rows will be added.

IDENTIFYING INFORMATION

Child(ren):

<u>Name</u>	<u>Date of Birth</u>	<u>Case Number</u>	<u>Date Entered Care</u>	<u>Current Placement Type</u>	<u>Date of Current Placement</u>	<u>Perm. Plan Goal Code</u>
[REDACTED] 'X'	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Child's Address (if not FH) [REDACTED]						
Native American?	[REDACTED]	If Yes, Tribal Affiliation [REDACTED]				

- b. At any time you need to add an additional child, just click into the name field for the first child and follow the same procedure in a.

Child Information Section Parent Agency Treatment Plan and Service Agreement:

- a. To add one or more children to a new Parent Agency Treatment Plan and Service Agreement, click into the “FIA Case Number” field for the child; a dialogue box will pop up. You will be prompted for the total number of additional children for the report. Enter the number; click OK and the additional rows will be added.

FIA Case Number	Child Name	Permanency Planning Goal Code	Target Date	Anticipated Next Placement Type	Date Anticipated Next Placement
[REDACTED] 'X'	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

- b. At any time you need to add an additional child, just click into the “FIA Case Number” field for the first child and follow the same procedure in a.

Adding Additional Parent / Caretakers

Identifying Information Section:

- a. To add one or more parent, caretakers or significant others to a new ISP and USP, click into the “Name” field for the parent; a dialogue box will pop up: You will be prompted for the total number of additional parent / caretaker’s for the report. Enter the number; click OK and the additional rows will be added.

Parent (Caretaker) Name(s):

<u>Name</u>	<u>Relationship</u>	<u>Children</u>	<u>Participating</u>
[REDACTED] 'X'	[REDACTED]	[REDACTED]	[REDACTED]
Parent's Current Address: [REDACTED]		Date of Birth [REDACTED]	Telephone: [REDACTED]

- b. At any time you need to add an additional parent, just click into the “Name” field for the first parent and follow the same procedure in a.

Adding Youth Signature lines

Signature Section of Parent Agency Service Agreement


- a. To add one or more Youth Signature lines to the Parent Agency Treatment Plan and Service Agreement, click into the Parent / Caretaker Name Field; a dialogue box will pop up: you will be prompted for the total number of needed youth signatures. Enter the number of signatures needed, click OK and the lines will be added. When you complete this procedure, you will then be prompted for the number of parent / caretaker names needed. See Adding Parent / Caretaker Signature lines below.

Parent/Caretaker Name:	[REDACTED] 'X'
Parent/Caretaker Signature:	_____
	Date: [REDACTED]

- b. At any time you need to add an additional youth signature, just click into the name field for the first signature and follow the same procedure in a.

Signature Section of the Permanent Ward Service Plan

- c. To add one or more Youth Signature lines to the Permanent Ward Service Plan, click into the Name and Title field; a dialogue box will pop up: you will be prompted to add the total number of needed youth signatures. Enter the number of signatures needed, click OK and the additional lines will be added. When you complete this procedure, you will then be prompted for the number of Name and Title signature rows will be needed.

Name and Title:  ' X ' _____


Signature: _____ Date: _____


- d. At any time you need to add an additional youth signature, just click into the name field for the first signature and follow the same procedure in c.

Adding Additional Parent / Caretaker Signature Lines

Signature Section of Parent Agency Service Agreement

- a. To add one or more Parent / Caretaker signature lines to the Parent Agency Treatment Plan and Service Agreement, click into the Parent / Caretaker Name field; a dialogue box will pop up:
 - i. First, you will be prompted to indicate if any youth signature lines are needed. If you need **youth signature lines**, enter the number needed and click ok. If there is not a youth to sign the agreement, click cancel or press the 'escape' key on the keyboard and a second dialogue box will appear. See 'Adding Youth Signature Lines' above.
 - ii. You will be prompted to add the total number of additional needed parent / caretaker signatures. Enter the number of additional signatures needed, click OK and the additional lines will be added.

Parent/Caretaker Name:  ' X ' _____


Parent/Caretaker Signature: _____ Date:  _____


- b. To add more signature lines, click in the first Parent / Caretaker Name field and the dialogue box will pop up, prompting you first for youth signatures and then the number of additional parent / caretaker lines. Follow the instructions in a. i. and ii.

Adding Additional FIA or POS signatures

Signature section of all documents:

- a. To add one or more agency signature lines to a new ISP, USP, Action Summary, PWSP and Parent Agency Treatment Plan and Service Agreement, click into the Name and Title field; a dialogue box will pop up: you will be prompted to add the total number of additional needed signatures. Enter the number of additional signatures needed, click OK and the additional lines will be added.

Name and Title:  'X' _____

Signature: _____ Date:  _____


- b. At any time you need to add an additional agency signature line, just click into the name field for the first signature and follow the same procedure in a.


Adding FIA Local Office Approval Signature Lines

All Service Plans and Treatment Plans

- a. To add one or more local office approval agency signature lines to a new ISP, USP, Action Summary, PWSP and Parent Agency Treatment Plan and Service Agreement, click into the Name and Title field under local office approval; a dialogue box will pop up: you will be prompted to add the total number of additional needed signatures. Enter the number of additional signatures needed, click OK and the additional lines will be added.

FIA Local Office Approval:

Name and Title:  'X' _____

Signature: _____ Date:  _____

- b. At any time you need to add an additional local office approval agency signature line, just click into the name field for the first signature and follow the same procedure in a

Adding Reunification Assessment

Section IV. C of the Updated Service Plan

- a. To add one or more additional Reunification assessments to a new Updated Service Plan, click into the total household number field that immediately precedes the reunification assessment (Household 1 of 1), click on the number of the household from the dropdown box and a dialogue box will prompt you for the number of additional households needed. Enter the number of additional needed households and click on enter. If no additional households are needed, click on 'cancel' or press escape on the keyboard.

Household **1** of **1** 'X'

C. Reunification Assessment

- b. To add sections at a later time, click into the total household field of the first household (if more than one) and follow the instructions in a.

Adding Permanency Planning Recommendation

Updated Service Plan Section V. 5

- a. If there is more than one child in the family, the USP is being prepared for the Permanency Planning Review and the recommendations differ for one or more of the children:
- b. Click on no in response to the Statement "This recommendation applies to ALL children".

☐ Yes ☒ No This recommendation applies to ALL children

- c. Then click into the "Recommendation for field".

Recommendation for: [REDACTED] 'X' [Enter the child's name.](#)

- d. A dialogue box will prompt you for the total number of permanency planning recommendations. Enter the total number of recommendation sections needed and click on enter. In the field for child's name, enter the names or names of the children addressed in the recommendation. If no additional sections are needed, click on cancel or press escape on the keyboard.

Adding Mandatory Petition information

Initial Service Plan, Section V. B.

- a. If there is more than one child in the family and the recommendations differ for one or more of the children:
- b. Click on no in response to the Statement “This recommendation applies to ALL children”.

☐ Yes ☒ No This recommendation applies to ALL children

- c. Then click into the “Recommendation for field”.

Recommendation for: Enter the child's name.

- d. A dialogue box will prompt you for the total number of mandatory petition recommendations. Enter the total number of recommendation sections needed and click on enter. In the field for child’s name, enter the names or names of the children addressed in the recommendation. If no additional sections are needed, click on cancel or press escape on the keyboard.

Adding Additional Service Referral Rows

Parent Agency Treatment Plan and Service Agreement and Permanent Ward Service Plan

- a. To add one or more service referrals to the Service Referral Table for a new Parent Agency Treatment Plan and Service Agreement, click into the Member Referred Field in the first row and click on the appropriate code. A dialogue box will pop up; you will be prompted to add the total number of additional referrals rows. Enter the number of additional needed rows and click on enter. With this procedure, new rows are added immediately following the first row.

A. SERVICE REFERRAL TABLE

Using the codes above for member referred and service provider type, enter the information for all services below.

Member Referred Code	Family Member Name	Barriers/ Needs Addressed	Service Type Code	Service Provider Name	Mo/Yr Referred	Mo/Yr Start	Target Completion Date (Mo/Yr)	Service Status	Completed Services	Completion Date (Mo/Yr)

- b. At any time you need to add additional referrals, just click into the Member Referred Code field for the first referral and follow the same procedure in a. With this procedure, new rows are added immediately following the first row.
- c. An alternative procedure for adding rows is to place the cursor anywhere in the service referral table and click the 'Add Svc Row' button on the toolbar. A row will be added immediately following the row the cursor was placed.

Adding Service Referral Headers

Parent Agency Treatment Plan and Service Agreement and Permanent Ward Service Plan, new page

- a. Place the cursor in any field in the first field on the new page. Click on 'Add SvcRef Head' button on the toolbar. A new heading will be added at the top of the page.

Removing Service Referral Headings and Rows

Parent Agency Treatment Plan and Service Agreement and Permanent Ward Service Plan

- a. Place the cursor in any row on the new page. The Service Referral Heading may be removed at any time by clicking on the 'Remove SvcRef Head' button on the toolbar.
- b. Place the cursor in the row you wish to remove. Click on the 'Remove Table Row' button on the toolbar. The row will be removed.